Figs.
Upon
Usig

Digitized by the Internet Archive
in 2012 with funding from
University of Alberta Libraries

http://archive.org/details/managementg10to1200albe

MANAGEMENT AND MARKETING

Course of Studies

DRAFT

1993–94 Field Review

- Introductory Level
- Intermediate Level
- Advanced Level

Career & Technology STUDIES

AUGUST 1993

Alberta

EDUCATION

CURRICULUM BRANCH

HD
31
A33
1993
gr.10-12
CURRGDHT

NOTE: Questions or comments about this course of studies are welcome and should be directed to:

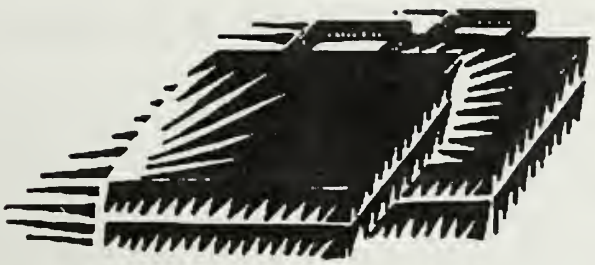
Mel Fisher
Program Consultant, Management and Marketing
Alberta Education
Lethbridge Regional Office
Provincial Building, 200 – 5th Avenue, South
Lethbridge, Alberta
T1J 4C7

Telephone: (403) 381–5243
Fax: (403) 381–5734

or to:

Sharon Prather
Program Manager, Career and Technology Studies
Curriculum Branch
Alberta Education
Devonian Building West
11160 Jasper Avenue
Edmonton, Alberta
T5K 0L2

Telephone: (403) 427–2984
Fax: (403) 422–3745



MANAGEMENT AND MARKETING

A. STRAND RATIONALE

In an evolving technologically oriented world, which politically and economically is experiencing continual change, the need for essential management and marketing knowledge, skills and attitudes is becoming more vital. Consumers must have a basis to make intelligent decisions, for entry-level employment opportunities, or for access to post-secondary programs.

Management and Marketing addresses the individual needs of students and accommodates their differences in interests and learning styles by providing opportunities for all students to integrate the abstract cognitive levels of learning with the psychomotor and affective domains. Students are encouraged to extend their knowledge, skills and attitudes beyond what is already familiar to them. Students complete practical applications and activities associated with operating both profit and non-profit business organizations in a professional manner when providing goods and services to customers. By developing basic, transferable and career-specific skills, students will become more enlightened and better informed consumers as well as possess increased ability to meet the challenges and opportunities offered by the workplace or available further education alternatives.

Basic skill development focuses on improving personal knowledge about one's self, broadening content background, and increasing the ability to work effectively with others. Transferable skill development equips the individual to increase self-confidence, which positively affects personal life experiences and creates workplace opportunities. Career-specific skills further enhance the individual's personal attributes while developing detailed workplace background and expertise that can be applied in a job or career pattern.

The key challenge addressed by managers and marketers is to ensure that the right goods or services are in the right place at the right time and are offered at the right price to the right people. Individuals must be able to recognize that technology has an impact on society, determine what the affect is, and then be prepared and equipped to meet the emerging opportunities. The modules in this strand provide students with the opportunity to develop managerial and marketing skills that can be applied personally, in relationships with the family, the community and the workplace. Students focus on the needs of the customer, addressing how best those needs can be met, suggesting what action needs to occur during the process, and identifying effective procedures for organizing and working with people, including the planning and decision-making processes required to ensure the productive utilization of the organization's available resources. Several modules from the Enterprise and Innovation strand further enhance opportunities to integrate and apply these developing skills.

Module content is organized for individual research and study, as well as participation in groups or teams using classroom support materials and available community expertise and resources. Activities are designed to provide for experiential and project-based learning with the teacher assisting, encouraging and challenging students to achieve their potential. The content in this strand supports and enhances other Career and Technology Studies strands as well as other areas of study by providing linkages to the home, post-secondary educational institutions and the workplace.

UNIVERSITY LIBRARY

B. STRAND ORGANIZATION

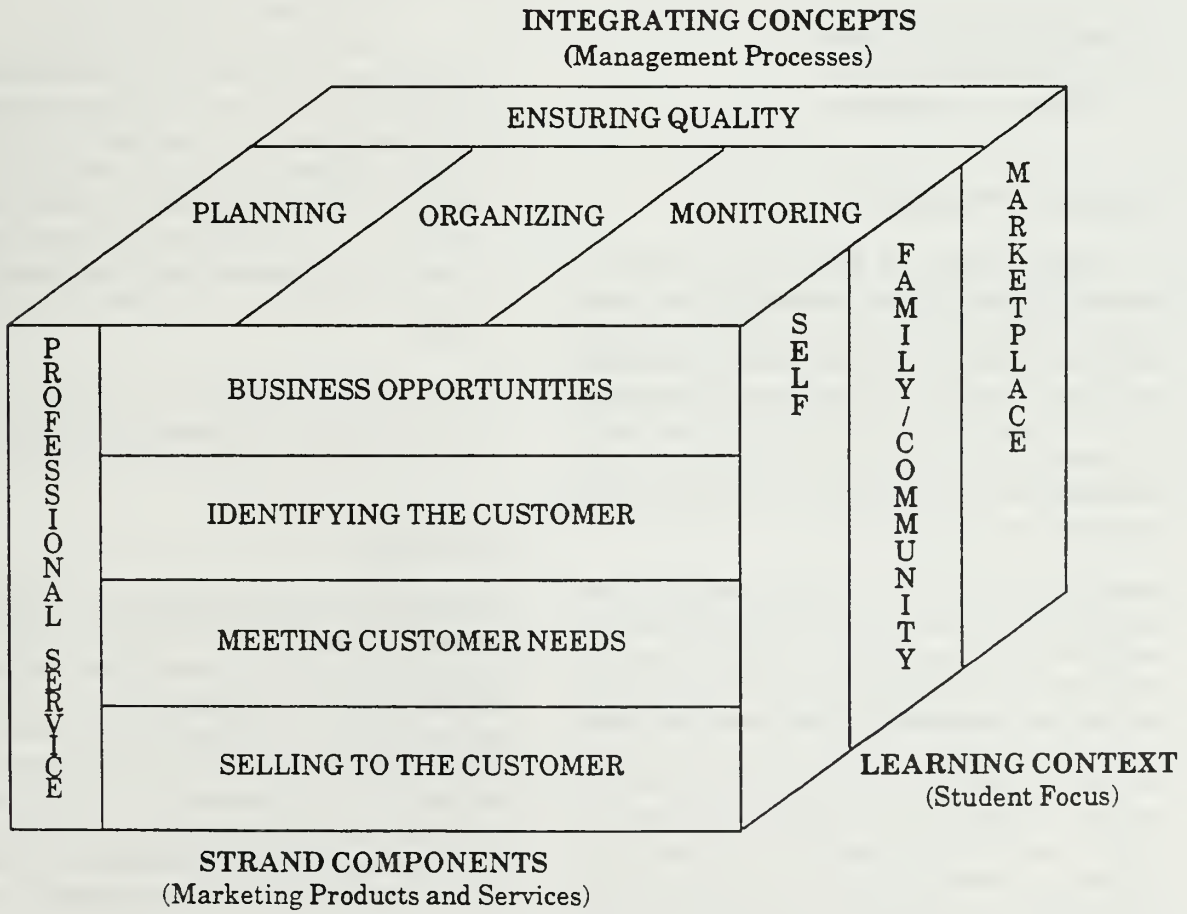
CURRICULUM STRUCTURE

The Management and Marketing strand is organized into three levels of learning: introductory, intermediate and advanced. The introductory level modules encourage students to develop basic skills by planning, implementing and monitoring activities related to business opportunities even if students do not have previous experience in this strand. The intermediate level modules support increased study depth about a business organization and the various aspects involved in managing and marketing products and services. The advanced level modules encourage the development of specific skills that support the integration of accumulated information essential for the successful application for the managerial and marketing functions.

DEVELOPMENT MODEL

The model below depicts the major emphases within Management and Marketing. The three dimensions provide the basis for selecting and organizing the specific content.

- The INTEGRATING CONCEPTS identify those key management functions of planning, implementing and monitoring that are performed to ensure the organization operates in a productive manner and offers quality and professional service that support customer satisfaction.



- The LEARNING CONTEXTS identify the student focus on developing knowledge and behaviours that meet and support *self* as a customer in personal living, further education and workplace experiences; and *self* as a manager/marketer in relationships with family, community and the marketplace.

- The STRAND COMPONENTS, represented by individual modules within the broad *customer* context, provide situational and concrete learning experiences where knowledge, skills and attitudes that relate to the integrating concepts and learning contexts are linked. Each strand component focuses on an area of study and activity within Management and Marketing.

THEMES

The modules in Management and Marketing are organized according to the following themes:

- Business Opportunities
- Identifying the Customer
- Meeting Customer Needs
- Selling to the Customer.

PROGRAM PLANNING

The Management and Marketing curriculum framework ensures that students do not repeat content. Schools and teachers have increased flexibility to design programs based on the needs and interests of their students and circumstances in the school and community. The levels framework will challenge students to keep learning and will provide new and exciting opportunities at each level.

Management and Marketing modules were designed to fit within a suggested 25-hour instructional time period. This is only a guideline to facilitate planning, because the curriculum is competency based and the student may take more or less time to gain the knowledge, skills and attitudes within each module. Grouping the modules will create a larger time slot and allow students' fast or slow progress to average out to the planned time requirement. Students who have made rapid progress are expected to move to the next selected module in their program plan.

Teachers will select three or more modules to design a course. Criteria that should be considered in designing course sequences are:

- student interests, abilities and career aspirations
- expertise and interests of the teacher
- potential linkages with other school programs.

Sample

The following is an example of a 3-credit course:

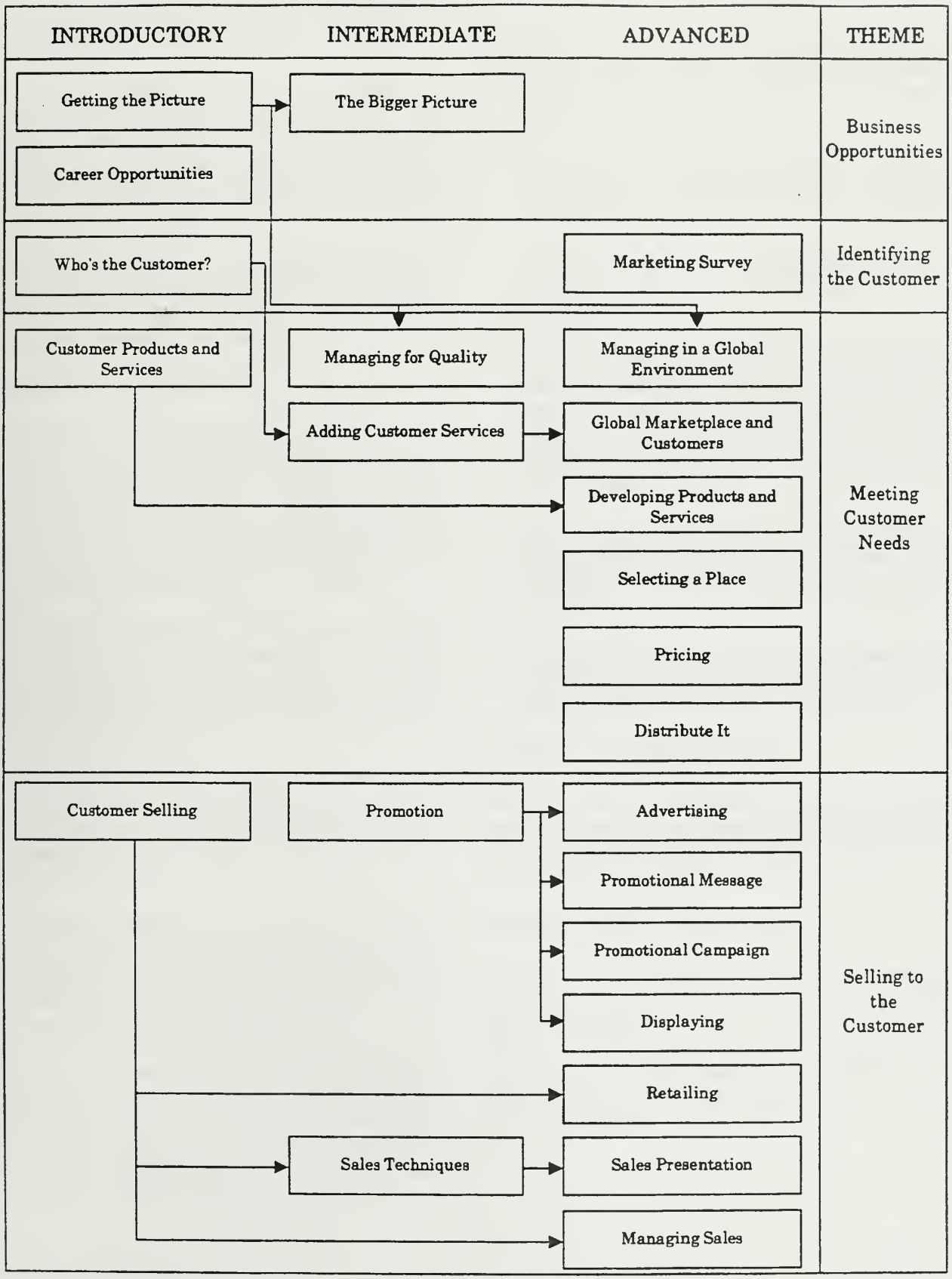
MODULES
• Getting the Picture (M&M101) • Who's the Customer (M&M103) • Customer Selling (M&M105)
RATIONALE/LEARNINGS
This course will provide an introduction to the management and marketing areas of business from the consumer and the corporate sector viewpoints. Students will explore such topics as organizatonal structure, management functions, identifying customer needs and meeting those expectations, and promotion and sales. This course will complement many other CTS, core and complementary programs.

LINKAGES

Management and Marketing is designed to support integration of knowledge, skills and attitudes in other Career and Technology strands as well as other study areas. Enterprise and Innovation modules can be used as an introduction to the content in this strand or to provide a focus context for managing the marketing application activities. On the other hand, the specific skills developed in this strand can be used to enhance and support learning

activities in the Enterprise and Innovation modules. In addition, Management and Marketing also offers direct integration opportunities with Communication Technology, Design Studies, Tourism Studies, Cosmetology Studies, Foods, Construction Technologies, Fabrication Studies, Information Processing, Financial Management and Legal Studies. In other study areas the managerial and marketing skills developed from this strand can be applied to specific content focuses as well as to personal life experiences and the workplace environment.

MANAGEMENT AND MARKETING SCOPE AND SEQUENCE



C. CURRICULUM AND ASSESSMENT STANDARDS

CURRICULUM STANDARDS

Curriculum standards are expressed through learner expectations, which describe the competencies that students are expected to develop. They require students to be active learners who can combine knowledge, skills and attitudes within an applied context.

Learner expectations for Management and Marketing are categorized in three, progressively detailed stages: strand, module and specific learner expectations.

Strand Learner Expectations

Strand learner expectations describe the overall characteristics of the Management and Marketing program and students actively participating in that program. They also form the basis for specific learner expectations within each module. Students working successfully in Management and Marketing will be able to:

- develop individual responsibility, self-management and self-confidence through a variety of practical, relevant learning activities by making management and marketing decisions
- apply teamwork skills and establish cooperative attitudes that support the development of positive human relations by participating in a range of group and class activities
- identify and match areas of personal interest or talents with the opportunities and challenges offered in the management and marketing areas leading to potential jobs, occupations and careers
- through idea generation, synthesis and outcome prediction, develop creative thinking skills that support meeting the challenges and opportunities created by changes in the technological, political and economic environments
- develop basic management and marketing competencies that can be applied throughout Career and Technology Studies and other study areas
- apply critical inquiry skills through the use of problem-solving and decision-making applications
- research, analyze, interpret and evaluate data applicable to management and marketing
- integrate previously acquired consumer life-skills and concepts with management and marketing knowledge, skills and attitudes that are necessary for additional post-secondary education or workplace expectations
- apply professional management attributes and effective marketing strategies that exemplify a conscientious and productive individual
- determine the impact that management and marketing has on the Canadian economy and on expanding international relationships.

Module Learner Expectations

Module learner expectations provide an overall curricular focus for each module. They describe what the student should know and be able to do to successfully complete the module.

Specific Learner Expectations

Specific learner expectations define the scope of learning, or content, to be covered within each module. They are a combination of knowledge, skills and attitudes and form the basis for assessment. Specific learner expectations for Management and Marketing modules are identified on pages 11 through 97.

ASSESSMENT STANDARDS

Assessment standards for each module describe the conditions and criteria, including concepts, principles and applications, for determining whether or not the student performance meets the identified standard.

To be successful a student must be able to demonstrate at an acceptable level *all* aspects of each assessment standard. This process may require a student to complete a plan, proposal, report or project, or perform specified activities and applications.

Assessment standards will be supported by assessment tools such as exemplars, performance checklists and appraisal worksheets.

MODULE M&M101: GETTING THE PICTURE

Level: Introductory

Prerequisite: None

Successful individuals and organizations, whether profit or non-profit, need to be organized and function in a cost-effective manner in order to efficiently meet stated goals. In this module students study organizational structure, the incentives for an organization to exist, factors that influence success, and the role of management and marketing.

Module Learner Expectations and Assessment Standards

Module Learner Expectations	Assessment Standards
The student will: • identify and assess key structures and functions of successful organizations	*The student will:* • develop a portfolio (using text, visuals, pictures, charts, graphs, illustrations, examples), which communicates: – organization structure, ownership, reason for existing – management role by level, skills required, functions performed – marketing processes – retailing operations – ethical and social responsibility considerations.

Specific Learner Expectations

Concept	Specific Learner Expectations	Notes
	The student will:	
The Organization	• differentiate between a range of organizations (family, household, school, community/service organization, business organization) and identify common characteristics	
• structure	• explain why organizations exist	
	• prepare organizational charts for the above organizations identified by participants in each	
	• discuss the role that each individual in the organization performs	
	• describe the difference between the formal and informal structural processes	
• ownership	• identify examples of the various types of organization ownership and explain how they are similar and how they differ: – public (local, provincial, federal) – private (sole proprietorship, partnership, corporation)	
	• explain how finances are raised by the various types of organization ownership	

Concept	Specific Learner Expectations	Notes
• size	*The student will:* • identify examples of small and large organizations and explain how they differ and how they are similar: – organizational structure – management functions – financing – services provided • describe the essential organizational structures and functions.	
Opportunity Climate • profit incentives • non-profit incentives • constraints	• describe an entrepreneur, the entrepreneurial opportunities that exist, and the risks involved • contrast a single entrepreneurial operation with multi-ownership organizations • identify examples of "profit" organizations and explain how that goal can be maximized: – market share – pricing – volume – image goals • identify examples of "non-profit" organizations and classify them as public or private • explain the purpose of non-profit organizations • explain the similarities and differences between profit and non-profit organizations and their operating strategies • research a specific organization and explain how the following constraints affect the organization and how these issues are addressed: – legal – political – social – cultural – economic – technology – environment – current trends • identify constraints that affect individuals or customers.	

Concept	Specific Learner Expectations	Notes
	The student will:	
Manager's Role	• explain the purpose of a manager	
• resources	• describe the management levels in an organization (management pyramid)	
• processes	• discuss how a manager handles resources (people, finance, information, materials, facilities) in the following processes: – planning (what needs to be done?) – organizing (how should it be accomplished?) – leading (who should do the work?) – monitoring (has it been completed?)	
• skills	• research and report on the basic managerial skills: – conceptual – technical – communication – human relations.	
Marketing	• explain the purpose of marketing and how the marketing function meets individual needs	
	• describe the marketing processes and provide examples: – concept – pricing – promotion – distribution – selling	
• mix	• identify an organization and determine how each of the above processes are handled including the marketing mix.	
Retailing	• describe the purposes of retailing	
	• discuss how retailing affects customers: – products/services – standards/criteria – service strategies	
	• provide examples of various retailers, and choose one to research for the above identified areas.	
Business Professionalism	• discuss "professionalism" and identify what it means for the individual and organization	
	• define the term "ethics"	
• ethics	• compare "codes of ethics" for several organizations	

Concept	Specific Learner Expectations	Notes
• ethics (continued) • social responsibility	*The student will:* • identify ethical considerations as they apply to organizations and managers: – company personnel – business associates – customers • discuss the concept of social responsibility and how it applies to an organization • identify major social issues and indicate how performance can be recognized or measured • provide examples of how a local organization deals with this area.	
Meeting Change	• research and describe how change affects society: – economic – political – technology – information.	

MODULE M&M102: Career Opportunities

Level: **Introductory**

Prerequisite: **None**

Decisions involving employment and career opportunities require research, information and planning. In this module the learner will explore the potential career market, research specific employment possibilities and prepare for the job interview.

Module Learner Expectations and Assessment Standards

Module Learner Expectations	Assessment Standards
The student will: • demonstrate job search and interview skills	*The student will:* • prepare a "Getting a Job" portfolio (using text, visuals, pictures), which explains how to conduct a search, and analyze and decide on a potential job by addressing: – employment expectations – access to employment services/information – possible occupational clusters to consider – emerging employment trends – potential employment opportunities in business – employer expectations/working conditions – employee remuneration and benefits • complete a personal goals/interest inventory • write a letter of application and participate in an interview.

Specific Learner Expectations

Concept	Specific Learner Expectations	Notes
Career Expectations	*The student will:* • list career expectations for the next 20 or more years and prioritize variables that are most important • identify career expectations about: – security – remuneration – advancement – variety – excitement – independence – other considerations • describe success in a job/career • list several jobs that currently have some appeal.	

Concept	Specific Learner Expectations	Notes
Employment Information	*The student will:* • research employment information/services that are available: – relatives, friends, acquaintances – school counsellors, community organizations – help-wanted ads (newspapers, trade magazines, bulletin boards) – private employment agencies – career planning/placement organizations – Employment and Immigration Canada (CMC, Hire-a-Student, others) – Computerized Career Selection System (CHOICES) – unsolicited inquiries/interviews – other sources.	
Employment Trends	• research employment trends to determine potential opportunities: – past history – current conditions – developing projections • discuss the technological impact on employment for: – traditional student/employment opportunities – non-traditional student/employment opportunities • identify rapidly developing/new employment areas.	
Occupational Clusters	• research and summarize potential job/careers by occupational clusters: – professional – paraprofessional – managerial/supervisory – sales – small business – skilled – semi-skilled – unskilled • develop an "employment profile" for areas that have appeal and include such considerations as: – type of work/duties/responsibilities – working conditions – remuneration/advancement/security – other conditions of interest.	

MODULE M&M102: CAREER OPPORTUNITIES (continued)

Concept	Specific Learner Expectations	Notes
Business Employment Opportunities	*The student will:* • research employment areas in: – management – marketing – retailing – distributing – production – wholesaling – manufacturing – selling – others • determine equal gender opportunities • conduct a job analysis on one or more areas of interest and include: – job description – working conditions – duties, responsibilities – education, training, experience – advancement opportunities – remuneration, benefits.	
Working Conditions, Remuneration and Benefits	• through research, or interview, job shadow, field trip, or day visit, determine employer expectations and working environments, employee compensation policies and practices: – employer expectations (education, training, personal characteristics, etc.) – working conditions (work schedule, responsibilities, duties, labour relations, communication networks, inservice programs, promotion opportunities) – remuneration (hourly, commission, combination, salary, quota, incentives) – benefits (fringe benefit programs).	
Personal Goals	• identify in detail personal values, attitudes, expectations that are important: – career goal – job expectations – motivation/interests/lifestyle – likes/dislikes – concerns – self-inventory (strengths/weaknesses) – personal priorities – education (completed, future plans)	

Concept	Specific Learner Expectations	Notes
Personal Goals (continued)	*The student will:* – work experience – other areas of importance • complete interest/aptitude inventory.	
Decision/Action • interview • on-the-job	• begin the process of convincing others of his/her potential: – complete job search materials (letters of reference, résumé, academic records, other supporting documentation) – complete application (letter, forms) – attend interview (answer questions, ask questions) • prepare for first day employment: – clothes – back-up plans and contingencies – special preparation • starting first day and beyond: – personal appearance, grooming – punctual – observe, listen, ask questions – pleasant, cooperative – productive work habits – be yourself – entry-level skills and expectations • perform for long-term opportunities/experience: – develop sound reputation – show growth in independence, decision-making skills, increased skill levels – demonstrate promotion possibilities • change jobs for: – advancement – career change – exploration – other opportunities • start own business operation: – opportunity – financing – resources – expertise.	

MODULE M&M103: WHO'S THE CUSTOMER?

Level: **Introductory**

Prerequisite: **None**

The success of an organization depends upon the ability to identify customer wants and needs and to meet these expectations by providing the products, services and environment that support customer satisfaction. In this module the learner will identify characteristics that customers possess and will use this information to develop a customer profile.

Module Learner Expectations and Assessment Standards

Module Learner Expectations	Assessment Standards
The student will: • describe a customer	*The student will:* • explain, illustrate and provide examples and information about customers addressing: – who are the customers? – why are they customers? – what do they want? – when are they customers? – where do customers go? – how do we treat customers?

Specific Learner Expectations

Concept	Specific Learner Expectations	Notes
Customer Profile • characteristics • personalities	*The student will:* • identify customer age groups and what is likely to be the buying focus of each group • discuss other factors that are associated with a customer (consider self, parents) • explain the difference between a customer and a consumer • explain a customer's personality/moods when considering a purchase • describe his or her personality the last time he or she went shopping: – is it always the same? – what causes changes?	• committed • undecided • just-looking • deliberate • know-it-all • silent • reluctant • friendly • disagreeable • impatient • domineering

MODULE M&M103: WHO'S THE CUSTOMER? (continued)

Concept	Specific Learner Expectations	Notes
	The student will:	
Customer Motivation		
• needs	• describe basic "needs" buying and identify several examples	
• wants	• describe secondary "wants" buying and identify several examples	
	• provide examples of when these two motives might change and explain why	
	• compare recent purchases and indicate if they were needs or wants	
• motives	• differentiate between individual motives and social motives	
	• list other buying motives and provide examples	
	• research and explain what influences buying motives: – rational/emotional – product/patronage	
	• identify your buying motives on a recent purchase	
• influences	• describe and provide examples of: – internal influences (attitudes, buying habits, cultural influences, beliefs) – external influences (promotion/advertising, store proximity/image/services, merchandise selection) • staples • convenience • seasonal • fashion	
	• identify influences on a recent purchase.	
Customer Satisfaction	• describe what produces satisfaction when making a personal purchase	
• purchase considerations	• explain the customer/consumer buying process by providing real-life examples for each step (research, including interviews): – problem recognition – information search – evaluation of alternatives – making the purchase – re-evaluating the purchase	

Concept	Specific Learner Expectations	Notes
• purchase considerations (continued)	*The student will:* • describe the potential impact on him or her as a potential customer of: – store location, size, image – merchandise selection, quantity, quality, price – promotion by store/products – service • list what he or she purchased in the last six months and classify as either wants or needs • identify what he or she would like to buy in the next six months and indicate why • select a target audience (classmates, friends, relatives, neighbours) and research/interview individuals as to their perceptions as customers • observe/report on customer behaviour in different retail settings • interview store manager/sales clerks about customer considerations	
• decision to buy	• identify the key issues he or she considers before making a purchase • classify purchase decisions and describe when the buying occurs and provide examples: – minor/repetitive – important/not critical – important/complex • discuss how a potential customer makes the following decisions before a purchase is actually made and provide examples: – what product to buy? – what price to pay? – when to buy? – where to buy? – what quantity to buy? • describe what influenced him or her to make a recent purchase • comment on his or her satisfaction, or lack thereof, from a recent purchase, and explain why.	

MODULE M&M104: CUSTOMER PRODUCTS AND SERVICES

Level: **Introductory**

Prerequisite: **None**

After the marketer has determined the customer's expectation, decisions about providing specific products and services are made. This module is an introduction to the marketing of products and services in a customer-oriented environment and also considers the economic impact.

Module Learner Expectations and Assessment Standards

Module Learner Expectations	Assessment Standards
The student will: • describe product characteristics and services available to customers	*The student will:* • explain (orally, written text, visuals, samples) in detail how products are classified, their identification, packaging and labelling considerations, and life cycles • develop a service industry profile, which identifies a range of available services and communicates how consumer expectations can be met • present a product/service mix strategy for a specific organization with rationale for the recommendations.

Specific Learner Expectations

Concept	Specific Learner Expectations	Notes
	The student will:	
Products	• define the term "product"	
	• research/visit a range of retail/wholesale outlets to determine the variety of goods (consumer/industrial) and products available	
• classification	• describe product classifications and provide examples found in small, medium and large marketing organizations: – convenience goods (products readily available, generally low-priced) – shopping goods (products purchased after price, quality, suitability comparison) – specialty goods (products preferred because of unique qualities)	
• identification	• identify and provide examples of product identification depicting: – trademarks (legal symbol/name) – brand name – logos	

Concept	Specific Learner Expectations	Notes
	The student will:	
• identification (continued)	• explain the impact and purpose of product brand names and provide examples • identify the unique selling points for a product in each brand category • describe and illustrate product brand loyalty: – recognition – preference – insistence	• family brands • individual brand names • national brands • private brands • generic brands
• packaging/ labelling	• identify/illustrate product/labelling (materials, size, shape, information): – protect/preserve – identify/promote – storage/usage – cost • provide examples of several package labels and discuss their effectiveness	
• life cycle	• research/collect/exhibit product life cycle examples illustrating: – introduction – growth – maturity – decline • discuss other life cycle issues and describe the characteristics of fashion and fads • illustrate and explain the fashion life cycle • explore the relationship between customer demand, product life cycle and the fashion life cycle	
• consumer products	• explain the characteristics of consumer products: – shopping products – convenience products – preference products – specialty products.	
Services • characteristics	• define services and provide examples • describe characteristics of services • differentiate between "products" and "services"	

MODULE M&M104: CUSTOMER PRODUCTS AND SERVICES (continued)

Concept	Specific Learner Expectations	Notes
• characteristics (continued) • expectations	*The student will:* • provide examples of service industries that support consumer-oriented client/sales relationships and indicate the role/functions performed: – retailing – tourism – finance – professional – personal – leisure • explain customer expectations of service-based ventures: – people-centered – intangible – perishable – inconsistent • demonstrate positive consumer-oriented/service provider attributes by using positive human relations skills • explain, illustrate the continuum of products and services classifications from a customer's point of view.	
Product Mix	• define product mix and provide examples that reflect differing emphasis • research/interview sales managers about the key considerations upon which decisions are made for a specific product mix • discuss the impact of a product line versus an individual product • compare brand name products with generic products indicating advantages/disadvantages.	
Product/Service Mix	• identify how decisions are made and effectiveness assessed in offering products and supporting services • research the economic impact of supplying products and services in the Canadian economy, including projections for the future.	

MODULE M&M105: CUSTOMER SELLING

Level: **Introductory**

Prerequisite: **None**

Selling to the customer is a basic function of marketing and affects the success of any retail organization. This module introduces the learner to the selling floor including sales and non-sales activities.

Module Learner Expectations and Assessment Standards

Module Learner Expectations	Assessment Standards
The student will: • demonstrate sales floor competence	*The student will:* • sell to customers • demonstrate efficient use of cash register operations, including making change, cash reconciliation procedures, cash deposits • demonstrate effective customer service (receipt preparation, customer concerns, store return policies) • apply retail store policies and regulations • apply maintenance procedures within the store by ensuring well-stocked shelves, using acceptable inventory strategies (rotation of stock), and requests for replacement orders • assist with advertising and displays • evaluate the experience.

Specific Learner Expectations

Concept	Specific Learner Expectations	Notes
Selling • personal characteristics	*The student will:* • differentiate between direct and indirect selling • compare retail selling with non-retail selling • examine the need to maintain high standards of personal: – health – grooming – cleanliness • demonstrate positive human relations with staff and customers • establish a service-oriented, professional selling attitude	

Concept	Specific Learner Expectations	Notes
• processes	*The student will:* • discuss the AIDA formula and demonstrate the application of each selling step: – attention – interest – desire – action • use acceptable communication skills and time management • provide quality customer service.	
Sales Floor • the role of sales clerk and supervisor • operation of cash register • cash reconciliation	• explain, demonstrate, convince, close sale • demonstrate sound product knowledge • demonstrate effective customer service (receipt preparation, dealing with various customer types, store return policies) • describe and/or demonstrate the role of sales clerk and supervisor in a retail setting • familiarize and locate various cash register machine parts/functions • demonstrate effective use of float and cash drawer organization • operate a cash register • accept customer cheques and credit cards • demonstrate how to make change and correctly count change back to customer • wrap/bag merchandise • demonstrate ability to close and cash out a cash register • demonstrate accurate cash reconciliation, determine cash shortages or overages, use of voids • demonstrate ability to complete a store deposit.	
Non-selling • policy and regulations	• identify, then discuss the store procedures, regulations and security measures instituted for facilities, worker, customers • identify measures required to deal effectively with stock shortages, internal theft and shoplifting, waste, loss	

MODULE M&M105: CUSTOMER SELLING (continued)

Concept	Specific Learner Expectations	Notes
• upkeep and maintenance of store	*The student will:* • practise daily upkeep of a displayed goods, both interior and exterior • maintain well-stocked shelves, using appropriate inventory methods (rotation of stock)	
• stock-keeping	• replenish stock	
• promotion	• assist with the advertising program and display creation.	

MODULE M&M201: THE BIGGER PICTURE

Level: **Intermediate**

Prerequisite: **Getting the Picture (M&M101)**

Businesses, which are structured in a variety of organizational formats and purposes, exist to generate profits by providing tangible products and intangible services to customers. This modules introduces the learner to the range of large and small business organizations and provides an opportunity to address some of the specific issues facing the entrepreneur.

Module Learner Expectations and Assessment Standards

Module Learner Expectations	Assessment Standards
The student will: • describe the purpose, structure and functions of business organizations	*The student will:* • explain, illustrate and provide examples of: – production operations • primary • manufacturing • construction • technology – wholesaling operations • manufacturer owned • retailer owned • independent – retailing operations • store • non-store • services • develop a proposal for a small business opportunity and address: – what customer potential exists – what resources are required/where will they be obtained – what personnel and expertise is needed – how much funding/where it will be obtained – where the outlet will be located/facilities needed – how the marketing will occur.

Specific Learner Expectations

Concept	Specific Learner Expectations	Notes
A Business Organization	*The student will:* • define the term business organization, explain why they exist and provide examples of different types of businesses • compare the organizational chart of a large business with that of a small business	

Concept	Specific Learner Expectations	Notes
• resource input • market output	*The student will:* • contrast the ownership possibilities of: – single proprietorship – partnership – corporation – franchise • explain the contribution that each variable makes to the operation of a business: – man/woman power – money – materials – machinery – management • describe how the goods and services provided by the business organization meets the needs of: – consumers – government – industry – foreign markets.	
Production	• define production and distinguish between manufacturing and non-manufacturing activities • explain the purpose and provide examples of the following production categories: – extractor – manufacturing – construction – production technology.	
Wholesaling	• explain wholesaling and indicate how the ownership affects the wholesaling operation: – manufacturer owned – retailer owned cooperatives – independent (merchant, agent).	
Retailing • small store	• define retailing and provide examples of various sized retailers • identify examples of small retail stores and describe the similarities and differences among: – general – convenience – specialty – catalog showroom – services	

Concept	Specific Learner Expectations	Notes
• large store • non-store	*The student will:* • identify examples of large stores and describe similarities and differences among: – department – variety – discount (open/closed door, factory outlet) – supermarket – hypermarket – mail-order – chain • describe non-store retail outlets and identify advantages and disadvantages of these business organizations: – personal (telephone, in-home) – catalog/mailorder – advertising – direct mail – vending machine – video/TV.	
Services • primary • customer	• list business organizations that provide services and contrast these operations with business organizations that sell products • list primary service retailers • discuss how primary services affect customers and indicate how the discretionary expenditures influence primary service retailers • list customer service retailers • provide an explanation as to why the service industry is increasing and identify specific reasons for this growth.	
Small Business	• define a small business and identify examples • discuss why small business operations normally focus on: – retailing – service – high technology • outline advantages and disadvantages of a small business	

Concept	Specific Learner Expectations	Notes
Small Business (continued)	*The student will:* • discuss how assistance/financing can be obtained for the small business enterprise from: – Department of Regional Industrial Expansion – Federal Business Development Bank • describe marketing considerations available for the small business: – intensive – selective – exclusive.	
Growth Opportunities	• research possible growth areas: – travel – leisure-time – working women – others.	

MODULE M&M202: MANAGING FOR QUALITY

Level: **Intermediate**

Prerequisite: **Getting the Picture (M&M101)**

The management function is responsible for coordinating all available resources in order to achieve the identified goals of the organization. This module provides an opportunity to develop basic managerial skills.

Module Learner Expectations and Assessment Standards

Module Learner Expectations	Assessment Standards
The student will: • describe management responsibility and apply management skills	*The student will:* • develop a "manager's handbook" (using text, charts, graphs, pictures, visuals), which explains the range of managerial responsibilities: – levels – skills – activities – functional areas – philosophies/styles • demonstrate basic quality-oriented managerial skill in: – planning – organizing – leading – monitoring • be assessed on a manager's performance rating: – ability to work with others – use of time – knowledge – initiative – attitude – judgement – decision-making ability.

Specific Learner Expectations

Concept	Specific Learner Expectations	Notes
The Manager	*The student will:* • explain the purpose of management activities in an organization and the role that the manager assumes in large and small organizations.	

Concept	Specific Learner Expectations	Notes
	The student will:	
Manager's Work		
• levels	• identify titles and compare the duties of top-level, mid-level and first-line managers	
• skills	• compare the relative importance of the managerial skills as they apply to each management level: – conceptual – technical – communication – interpersonal	
• functional areas	• research the management roles in the following functional areas and explain management tasks and responsibilities in each: – research/development – production/manufacturing – finance/accounting – marketing – administration – management services – personnel – purchasing.	
Managerial Activities	• describe and provide examples/illustrations of what a manager does and how this is accomplished	
• planning	• research planning as one of the four basic management functions and elaborate in detail: – establishing objectives (e.g., increased market share, increased profit, increased social responsibility) – determining how objectives will be met (coordinating organization resources, personnel, finances, information, materials, facilities and what activities are required)	
	• discuss similarities and differences in forecasting/planning at the three management levels (strategic, tactical, operational)	
	• explain why contingency planning is vital	
• organizing	• research *organizing* as the second of the four basic management functions and elaborate on the importance of organizing (identify who is involved, who is in charge, what resources are required, and how communication will flow)	

Concept	Specific Learner Expectations	Notes
• organizing (continued) • leading	*The student will:* • discuss how people working for a common objective can be organized for efficiency (synergism) • develop schematic representations that depict the division of labour and provide an explanation • describe and provide examples of: – organizational charts – centralized versus decentralized control – power, authority, responsibility, accountability, delegation • discuss motivations and factors that affect individual motivational levels: – individual differences (attitudes, needs) – job characteristics (task and its significance, skill levels, autonomy, feedback, communication) – organizational policies and practices (rules, intrinsic/extrinsic rewards) • describe how effective leaders influence others to act: – share influences and motivate individuals – match individual aspirations with organization goals – apply intuition, anticipate change, assess, respond – vision—identify different/better ways of proceeding – self understanding—recognizing one's own strengths and weaknesses • research the communication process and describe/illustrate what is involved, including the information channels available • discuss the feedback communication loop and how barriers to communication can be minimized/overcome • compare the types of groups that exist in an organization and explain how group development/processes can be encouraged • identify reasons for conflict and stress • describe how a manager can deal with conflict/ stress in a positive manner	

Concept	Specific Learner Expectations	Notes
• monitoring	*The student will:* • explain how technology can be used to help monitor data, information, organizational activities • discuss how managerial control is influenced by internal and external factors: – finances – market – machines/technology – bureaucracy • elaborate on ethical issues of monitoring and control of employees.	
Managerial Approach	• research and briefly discuss, with examples, the impact of management philosophy and style on employees: – classical – behavioural – modern • explain: – how "power" is obtained and used – the relationship of "power" and "authority".	
Quality Management	• describe how groups/teams can be used effectively: – team size/type – team leader role – team decision • discuss how quality management can be implemented (people, process) – quality objectives – communicate quality expectations – train employees/encourage work in a positive environment – give rewards • apply quality management skills in a group environment.	

MODULE M&M203: ADDING CUSTOMER SERVICES

Level: **Intermediate**

Prerequisite: **Who's the Customer? (M&M103)**

Once the basic services have been provided, the next consideration involves expanding services to meet the broad range of customer expectations, needs and satisfaction. In this module the learner will develop a customer profile (by surveying the marketplace to identify a broader range of customer wishes and preferences) and present an action plan that will respond to increased customer expectations and support.

Module Learner Expectations and Assessment Standards

Module Learner Expectations	Assessment Standards
The student will: • develop a customer expectation profile and a plan to meet increased customer support	*The student will:* • develop a "customer profile" (using text, visual charts, graphs), which addresses: – age – geography – gender – culture – occupation – income – family/marital status – accommodation • explain (text, visuals, examples) how the customer profile expectations will be met by addressing: – environment/competition – merchandise (selection, quality, price) – promotion – service – change (customer demand, technology).

Specific Learner Expectations

Concept	Specific Learner Expectations	Notes
Customer/Consumer	*The student will:* • examine/report on characteristics of the Canadian consumer • compare retail outlets with wholesale outlets to determine how potential customers are treated • identify products/services that have been developed/modified/promoted by consumer pressure/demand • discuss the impact of lobby groups	

Concept	Specific Learner Expectations	Notes
Customer/Consumer (continued)	*The student will:* • research the influence of competition/selection/ cost • explain how self-concept affects the actions of a customer • observe/report customer behaviour in different retail settings • interview store managers/sales clerks about customer considerations • determine the geographic range of customer support.	
Customer Considerations	• research the following areas and report on the impact/considerations that need to be addressed: – competition – environment – merchandise – personnel – promotion – service – facilities.	
Meeting Change	• research and describe how customers change because of evolving societal trends and what impact this has on marketers: – customer mobility – population/income shifts – consumer awareness – personal values/family roles – technological impact (ordering, check-out and payment).	
Addressing the Customer Profile	• design a plan that addresses the identified customer profile including: – expanded products/services – increased floor/display space – increased personnel – financial considerations – possible increase in market.	• make recommendations for the establishment of a school store/ expanded services for an existing school store.

MODULE M&M204: PROMOTION

Level: **Intermediate**

Prerequisite: **None**

Promoting products and services to customers is an important part of marketing. In this module the learner will explore, through observation and by relating past experiences, the many areas of promotion including sales promotion, advertising, visual merchandising, selling and public relations. An opportunity will be provided to develop a promotion plan that addresses all of these activities.

Module Learner Expectations and Assessment Standards

Module Learner Expectations	Assessment Standards
The student will: • develop a promotional plan and recommend a promotional mix	*The student will:* • create a "promotion handbook" (using text, graphics, illustrations, examples), which explains the potential range of opportunities: – sales promotion – advertising – visual merchandising – personal selling – public relations • present a recommendation for a specific promotional campaign that provides details and reasons for each phase of the promotional mix.

Specific Learner Expectations

Concept	Specific Learner Expectations	Notes
Promotion	*The student will:* • discuss promotion as a form of communication • contrast promotion policies with promotion methods, including the following alternatives: – non-promotion – semipromotional – promotional • explain each of the elements of promotion and provide specific examples/illustrations: – sales promotion – advertising – visual merchandising – personal selling – public relations.	

Concept	Specific Learner Expectations	Notes
	The student will:	
Sales Promotion	• describe the purpose of a sales promotion • identify the various techniques that are used and provide examples of each • collect/display examples of retailer's and manufacturer's sales promotion • analyze the effectiveness of various sales promotional activities • explore the role of psychology in sales promotion (AIDA concept) • identify and discuss the laws regarding sales promotion activities	
• advertising	• discuss the importance and significance of advertising and the role it plays within sales promotion • identify the types of advertising (national, regional, local, etc.) • describe the purposes of advertising • analyze/compare a variety of advertisements • discuss the various criticisms, controversies and laws regarding advertising • analyze a variety of advertising campaigns and distinguish successful advertising from unsuccessful advertising • explore the use of advertising agencies versus having your own advertising department • identify various advertising media • discuss the advantages and disadvantages of each type of media • determine the effectiveness of a particular medium for a given product and target market	• least expensive form of communication • sell products and services • develop awareness of new products • maintain customers • improve profit margin • create an image • increase strength of the entire industry
• visual merchandising	• visit retail outlets and analyze the types of displays • describe display layout features including: – floor design/location – lighting effects – signs – fixtures – products	

MODULE M&M204: PROMOTION (continued)

Concept	Specific Learner Expectations	Notes
• visual merchandising (continued)	*The student will:* • compare the outlet promotion policy with the actual displays/display area(s) • discuss various retail outlets and their respective displays: – similarities – differences – major focus/theme • list the various types of displays	
• personal selling	• explain the purpose of personal selling • describe the attributes (personal qualities) that a professional salesperson needs to possess and identify peers who display these qualities • identify and explain the responsibilities of retail salespersons (wage sales clerks, commissioned sales clerks, cashiers) • identify and explain the responsibilities of non-retail salespersons (contact, door-to-door, detail, agents, representatives, jobbers, brokers, etc.) • describe the steps used (AIDA concept) in personal selling and compare by observing salespersons in action • identify and discuss the personal attitudes that help lead to sales success	
• public relations	• explain what public relations involves and its purpose • identify public relations services: – firms – activities/products • indicate how public relations affects a business operation and how an individual can have a positive influence • describe how a "positive image" is developed and provide examples • identify publicity and indicate how this can occur.	

MODULE M&M205: SALES TECHNIQUES

Level: **Intermediate**

Prerequisite: **Customer Selling (M&M105)**

Salespeople are needed throughout the marketing process. Personal selling is required to market various types of goods and services. In this module students will learn techniques for success in selling.

Module Learner Expectations and Assessment Standards

Module Learner Expectations	Assessment Standards
The student will: • demonstrate sales technique	*The student will:* • develop a "salesperson's guide" (using text, illustrations and examples), which addresses the steps in selling: – preapproach – approaches – determining wants – presentation – resistance – closing • close a sale with a customer.

Specific Learner Expectations

Concept	Specific Learner Expectations	Notes
Selling	*The student will:* • define selling and differentiate between products and services • describe selling opportunities, including similarities/differences: – retailers, wholesalers, manufacturers – other sales areas	
• the salesperson	• discuss the role of the salesperson in: – the buying and selling process – selling self, the products/services, the business – human relations	
• personality traits	• identify personality traits that are needed by salespeople and indicate why they are important	

Concept	Specific Learner Expectations	Notes
• customer expectations • communication	*The student will:* • list characteristics that customers expect to find in a salesperson and indicate: – why they are important – why they can have either a positive or negative effect • comment on what is required in a successful sales presentation.	
The Customer	• identify why people buy • define the different types of consumer goods • discuss the timing/cycles/seasons of purchases • describe different customer types.	
Steps in Selling • preapproach • approach • determining wants • presentation	• observe salespersons and customers during the selling process and summarize the selling techniques used and customers' reaction • describe how a salesperson prepares for the customer: – customer characteristics/motives – product/service information • gather and analyze information related to prospective customers and product information • explain how the welcome statement can help get attention and establish customer rapport • practise a variety of approaches (service greeting, merchandise approach: formal, informal) • comment on the effectiveness and timing used by the salesperson to identify the customer needs and wants: – observe customer – selling statement(s) – ask question(s) – listen to customer • develop a series of questions to determine the customer's needs • indicate the importance of determining the type of customer and how the sales presentation is tailored to encourage the customer: – decided – undecided – just looking	

Concept	Specific Learner Expectations	Notes
	The student will:	
• presentation (continued)	• explain how the salesperson can recognize customer buying signals	
	• suggest possible sales activities/responses for customer personality types	• friendly • know-it-all • silent • deliberate
	• discuss the use of sales demonstrations and their effectiveness: – by salesperson – by customer	
	• identify other techniques that are used by salespersons to encourage customers	
	• plan a demonstration of a product, comparing product features with benefits, unique selling points, sensory appeal, etc.	
• resistance	• explain what a salesperson can do to counteract customer: – objections – excuses	
	• discuss possible techniques for answering objections and indicate under what circumstances they could be appropriately used as an answering method	• question • yes, but • superior point • direct-denial • boomerang • third-party • demonstration • close-on-an objection
	• prepare a variety of objections that customers may raise and describe how to overcome these objections effectively	
• closing	• describe how a natural close to the sale can be achieved by including the following alternatives: – stop demonstrating/showing the product – narrow the selection – discuss ownership – ask to buy – determine why there is reluctance – be confident	
	• discuss the conditions under which the salesperson determines the appropriate time to close the sale	
	• explain the purpose of the trial close and how it can be included in the sales discussion	
	• list a variety of closing techniques and describe the circumstances that would best support each	
	• discuss lost sales, errors in closing a sale, and preparing for the next sale	

Concept	Specific Learner Expectations	Notes
• closing (continued)	*The student will:* • identify the techniques that can be used to support more sales (currently, in the future) • demonstrate the mechanics of closing.	• obtain small favourable decisions • reinforce added decisions • seek frequent agreement • narrow choice • select closing technique • close sale.
Non-selling Duties	• describe sales support activities: – stock-keeping – housekeeping – build displays – prevention of loss/waste – direct customers – handle complaints – follow store policy.	

MODULE M&M301: MARKETING SURVEY

Level: Advanced

Prerequisite: None—Recommended module(s) will vary depending on the topic of the research selected (customer, place, product, price, promotion, or a combination of the submixes and marketing survey).

Introducing new products to the market is expensive. The marketer needs to test all aspects of a product (physical product, price, promotion, place) or service to insure there is customer demand before money is spent on the marketing venture. In this module the learner will have the opportunity to conduct a marketing survey, analyze the results, and make recommendations about the feasibility of the marketing project.

Module Learner Expectations and Assessment Standards

Module Learner Expectations	Assessment Standards
The student will: • conduct a marketing survey study	*The student will:* • present a report (including text, visuals, graphics, samples), which describes in detail: – the purpose of the survey – the planned study details • data (sources, collection method, analyses) – the actual experiences encountered during the study – the results of the study, including possible alternatives – the recommendations and reasons why – an evaluation of • the process • the report.

Specific Learner Expectations

Concept	Specific Learner Expectations	Notes
Marketing Surveys/Research	*The student will:* • describe the purpose, importance and use of marketing research • explain the steps involved in conducting a marketing survey (identify the problem, plan the survey, collect data, analyze data, make recommendations) • visit several retailers to determine what marketing research is conducted and how it is used • research one type of marketing survey and report on its impact.	

MODULE M&M301: MARKETING SURVEY (continued)

Concept	Specific Learner Expectations	Notes
Data • sources • collection • analyses • interpretation	*The student will:* • describe what constitutes data, and give examples • identify where data can be found • determine how the data will be collected (telephone, visit/interview, mail, computer, diary) • select target population (sample size, location, randomness, biases) • design survey instrument (open-ended, forced choice, combination, continuum) • sort data, categorize data, calculate, collate information, present information (text, chart, graphs) • present results and make recommendations.	
Marketing Survey	• conduct a marketing survey: – identify the problem and establish the goal of the survey – develop a research plan for achieving the goal – develop data collection instrument/process – collect information about the problem: • secondary data • primary data – government sources – private sources – experimental – observational – panels – surveys – interviews – tabulate and analyze information – report results (make conclusions and recommendations) – indicate how the results of the survey could be applied to the problem – evaluate the survey process and the end product.	

MODULE M&M302: MANAGING IN A GLOBAL ENVIRONMENT

Level: **Advanced**

Prerequisite: **Getting the Picture (M&M101)**

Recent world economic and political changes have increased awareness of potential business opportunities abroad. This module introduces the opportunities and challenges that confront the managerial role in establishing a global business operation.

Module Learner Expectations and Assessment Standards

Module Learner Expectations	Assessment Standards
The student will: • describe management considerations when operating in a foreign country	*The student will:* • develop a procedures manual (using test, visuals, pictures, examples) for managers who deal with international business organizations, which addresses: – global business opportunities – foreign companies organization/structure – strategies required for international operation – impact of competition and trade agreements – foreign constraints and conditions – cultural considerations versus Canadian practice • provide information from an international business organization as illustrations/examples.

Specific Learner Expectations

Concept	Specific Learner Expectations	Notes
Global Business Opportunities	*The student will:* • research and report on existing international business ventures (foreign companies in Canada, Canadian companies abroad) and identify potential opportunities • identify and describe organizational structure and manager functions (using descriptive text, organization charts): – multinational corporation – international corporation – international division – small companies – private entrepreneurs	

Concept	Specific Learner Expectations	Notes
Global Business Opportunities (continued)	*The student will:* • discuss the pros and cons of various forms of international business opportunities: – foreign subsidiaries – joint ventures – management contracts – licensing agreements – importation/exportation of products/services.	
International Operations Organization	• prepare an organization chart, functions and duties, description, and examples of: – export department – export manager – commission agent • discuss "globalization" as a trend that will change the world of business and affect individuals • describe the basic concepts of international trade from a fiscal and economic position: – balance of trade – balance of payments – exchange rate (floating, devaluation, revaluation) – counter trade.	
Strategies for International Operations	• describe the global competitive forces being exerted on the Canadian business community • identify the major competitive geographic regions/countries and what their strengths and weaknesses are compared to Canada • discuss the high demand trade products/services and provide a rationale for them • explain how a Canadian business operation might determine its "niche" in the international marketplace • research and summarize how management might deal with the basic ingredients required for an effective international strategy: – significant competitor in major markets (North America, Europe, Asia) – development of new products/services – maximize advanced technology capability (communication, research, production)	

Concept	Specific Learner Expectations	Notes
Strategies for International Operations (continued)	*The student will:* – clarify profit targets – management decisions based on a global perspective – encourage exposure to foreign countries and customs • research and elaborate on possible involvement opportunities on the international business scene (provide examples and identify management's role): – exporting (active, accidental/casual) – importing (directly/indirectly) – licensing (licensee/liscensor) – franchising (franchisee/franchisor) – foreign marketing – foreign production and marketing.	
Competition/Trade Agreements	• identify existing Canadian legislation/ regulation that promotes or hinders trade with: – other provinces – the United States – other countries • explain and discuss: – General Agreement on Tariffs and Trade – Canada/U.S. Free Trade Agreement – North American Free Trade Agreement – European Common Market – other international trading agreements • describe a "protectionist" policy and the historical impact it has had on countries • discuss/debate Canada/U.S. actions regarding: – tariffs – dumping – import/export tax.	
Constraints and Conditions	• identify and assess managerial considerations in a foreign country with respect to the following issues: – legal – economic – social – geographic – technology – education – environment – climate	

Concept	Specific Learner Expectations	Notes
Constraints and Conditions (continued)	*The student will:* • contrast risks/challenges to opportunity and indicate on what basis a positive decision would be made to proceed with a foreign venture.	
Cultural Considerations	• discuss the relevance and importance associated with making decisions about a foreign operation: – demographics – value systems – social change – language – customer/etiquette – gender issues – quality of life – ethics/social responsibility.	
Management Strategies	• describe how management would reconcile Canadian practices versus accommodation of a foreign country's expectations: – leadership practices – organization structure – employee motivation levels/incentives – quality standards.	

MODULE M&M303: GLOBAL MARKETPLACE AND CUSTOMERS

Level: **Advanced**

Prerequisite: **Adding Customer Services (M&M203)**

The values of a new generation of Canadians, new demographics and the formation of trading blocs, along with an increase in international trade, will reshape most products, services and jobs. In this module the learner will look at business ventures beyond the borders of Canada, examine the reasons why countries trade with one another, look at a variety of cultures and focus on Canada's role in the global marketplace as it relates to customers.

Module Learner Expectations and Assessment Standards

Module Learner Expectations	Assessment Standards
The student will: • present an import/export products/services plan to meet customer expectations	*The student will:* • develop an "import proposal" (using text, visuals, examples), which explains the processes and procedures involved in importing a product/service from a foreign country and making it available to customers • develop an "export proposal" (using text, visuals, examples), which explains the processes and procedures involved in exporting a product/service • the following issues will be addressed: – customer need/want – product/service specifications – legal, ethical, environmental constraints/obligations – shipping/customs/storage – promotion.

Specific Learner Expectations

Concept	Specific Learner Expectations	Notes
Entering the International Market	*The student will:* • explore why countries trade with each other • define and compare multinational corporations with global corporations • identify and discuss the forms of international business activities—importing, exporting, franchising and joint ventures • examine the barriers to world trade—cultural, political, legal • explain how world trade is regulated (economic systems, international organizations, trading pacts, International Monetary Fund, World Bank, economic summits).	

Concept	Specific Learner Expectations	Notes
International Marketing Opportunities	*The student will:* • explain how free trade has and will affect Canada • debate Canada's trade relationship with the U.S. and Mexico • examine the significance of trading with nations of the Pacific Rim • analyze how the formation of the EEC (European Economic Community) will affect Canadian trade • investigate the potential opportunities for expanding trade with China, CIS and other developing nations.	
Adapting to the Global Marketplace	• discuss the significance of understanding different cultures and customs • investigate cultures and subcultures of other countries (values, customs, ways of thinking, etc.) • examine how culture influences business practices: – power, role, status, decision-making process – social behaviour – individual versus group orientation – language differences such as semantics and translations – communication—oral, listening skills, non-verbal • compare Canadian culture to other cultures and discover ways of "doing business" with other countries • create a new product or service for the global marketplace (customize products and services for different markets around the world) • discuss various career paths available for Canadians in international business.	• manners, etiquette, greetings, gifts, work attitudes • space, touch, dress, time, facial expression, emotions, eye contact, gestures, posture and body movement
Impact on Customers	• identify foreign products and services that have a potential market for the local customer • research/plan processes that need to be addressed before importing and marketing a product/service • develop a proposal that describes how to import/export a product/service.	

MODULE M&M304: DEVELOPING PRODUCTS AND SERVICES

Level: **Advanced**

Prerequisite: **Customer Products and Services (M&M104)**

Developing products and services and managing them to meet the demands of customers are major challenges to marketers. In this module the learner will concentrate on customer-oriented marketing by defining target markets, identifying customer buying motives and developing a proposal for new products and services.

Module Learner Expectations and Assessment Standards

Module Learner Expectations	Assessment Standards
The student will: • present a new produce/service plan with an illustration or example	*The student will:* • develop a "new product/service" proposal that: – explains a new product/service development strategy – describes possible ideas and how they can be evaluated – explains how the analysis for possible success can be conducted – identifies how the prototype will be developed – reports on the market test results – describes production considerations that need to be met – outlines a customer-oriented marketing program including promotion, distribution, sales activities – compares this product to existing products – evaluates the development process and the product • create the prototype.

Specific Learner Expectations

Concept	Specific Learner Expectations	Notes
Customer-oriented Marketing	*The student will:* • compare customer-oriented marketing with product-oriented marketing • describe market segmentation and target market • identify and describe the components of a new product/service target market in terms of its: – participants—decision makers versus decision influences – demographics—age, gender, income, geographical location, education, economic background, ethnic origin – psychographics (lifestyle segments)—attitudes, interest, lifestyle, habits	

Concept	Specific Learner Expectations	Notes
Customer-oriented Marketing (continued)	*The student will:* • explain how customer buying motives might affect new product/service development: – Maslow's Heirarchy of Needs – rational buying motives – emotional buying motives • describe how customer habits and attitudes have changed over time and what considerations need to be addressed in planning new produce/service development • identify the different types of markets and their focus on products and services: – consumer market – industrial markets—manufacturers, wholesalers, retailers.	
Available Products and Services	• list by classification a range of products and services that are available: – products (staple, convenience, seasonal, fashion) – services (delivery, consulting, personal, public).	
New Product/Service Planning	• explain how superior product/service characteristics are identified • describe how the success of a new product/service is measured: – market share – effectiveness – consumer acceptance • research and report on a recently available new product or service.	• beats competition • special/unique
New Product/Service Development	• explore "new idea" generation possibilities • use the new product/service development steps to create a new product or service and record his or her experiences: – develop new product/service guidelines and strategies – ideas (generate, screen, evaluate) – conduct market potential analysis – create a prototype – test the market for reaction (evaluate, modify, discard, or proceed)	

Concept	Specific Learner Expectations	Notes
New Product/Service Development (continued)	*The student will:* – plan production activities – establish commercialization operation plans (packaging, labelling, marketing program, sales force).	
Product Mix Strategies	• research and report on a variety of strategies when establishing a product mix: – developing a product line – expanding or contracting from an existing line – improving existing products – differentiating the products – developing new uses – introducing new products.	

MODULE M&M305: SELECTING A PLACE

Level: Advanced

Prerequisite: None

The location and physical facilities of an organization are important factors in its success. In this module the learner will have an opportunity to research a potential location for a specific organization and to design a floor layout plan.

Module Learner Expectations and Assessment Standards

Module Learner Expectations	Assessment Standards
The student will: • recommend a location and site • design a floor plan	*The student will:* • present a report (using text, visuals) that explains the considerations that need to be addressed when choosing a location and specific site: – community economy – population trends – competition – local laws – potential customer base – competitor's proximity – traffic patterns – parking – shopping habits – physical facilities • describe and illustrate the store/floor design (inside and outside) • design a floor plan that identifies/illustrates selling and non-selling areas.

Specific Learner Expectations

Concept	Specific Learner Expectations	Notes
Location Consideration	*The student will:*	
• information	• research and report on sources of information for possible organization locations and sites: – primary sources – secondary sources	
• attributes	• identify availability of: – transportation – labour – market	

Concept	Specific Learner Expectations	Notes
• attributes (continued)	*The student will:* • describe attractive attributes for: – community – district – site • provide examples of organizations (description, pictures, maps, charts) that exhibit ideal characteristics.	
Location Alternatives	• observe several existing organizations and assess the positive and negative aspects of their locations, sites and facilities • compare features associated with geographic alternatives: – rural/urban – community (economy, services, competition, population trends) – district (central, fringe, neighbourhood) – sites (type of goods, traffic patterns, facilities available) • identify possible alternative locations and sites, rank them according to their advantages and disadvantages.	
Facilities	• discuss facility consideration factors: – nature of organization and facility requirements – physical space requirements – present/future needs – availability • compare costs and financing associated with: – renting – leasing – buying – building.	
Choosing the Site	• investigate, compare, select and support your choice of a specific location and site by addressing: – the community – the district – the site – nature of the organization – facility.	

MODULE M&M305: SELECTING A PLACE (continued)

Concept	Specific Learner Expectations	Notes
Store/Floor Design	*The student will:* • analyze the: – space required – work flow patterns (employee, customer) – equipment/display/physical arrangement • discuss and illustrate how to incorporate: – enticements to customers (come, stay, buy, return) – efficiency/service – flexibility/convenience – safety (employees, customers) – security (merchandise, equipment) – maintenance (day-to-day, repair, remodel) • compare physical characteristics of existing facilities: – image of business – physical objects (inside/outside) – entrance – displays/fixtures – equipment – selling/support area – lighting – decor (ceiling, walls, floor, carpet, etc.).	
Floor Layout	• research the principles of floor design and layout (feature, impulse, staple goods, physical arrangement) • compare layout patterns among stores with similar products lines: – supermarket – department – small store – service operation • identify elements that compete for space on the floor • design a floor plan for a specific business operation • describe/illustrate: – why the plan is functional – selling/non-selling areas – equipment/furniture – decor – image of business (inside/outside).	• background in Design Studies is helpful

MODULE M&M306: PRICING

Level: **Advanced**

Prerequisite: **None**

Determining appropriate sale product or service pricing is a continuous challenge for all business ventures. This module provides students with an opportunity to determine the "best" pricing considerations and strategies that entice the customer and support the business operation.

Module Learner Expectations and Assessment Standards

Module Learner Expectations	Assessment Standards
The student will: • prepare pricing policy guidelines and calculate prices for products/services	*The student will:* • develop "pricing product/service guidelines" (using text, visuals, examples) for a specific organization/venture, which address pricing: – objectives – policies – determination factors – strategies – decisions • apply pricing guidelines and calculate: – markup (percentage of retail, planned markup percentage) – markdown (percentage of retail) – cash discounts (5/15, net 30) – trade discounts (list, less 40, less 10).

Specific Learner Expectations

Concept	Specific Learner Expectations	Notes
Factors Influencing Price • internal	*The student will:* • define the term "price" • compare manufacturer's suggested selling price with actual selling price among a range of products • provide examples of how pricing policies affect the marketing mix • explain how product differentiation affects prices and provide actual product prices to support this concept • identify how various retail outlets determine and apply their pricing policies	

Concept	Specific Learner Expectations	Notes
• external	*The student will:* • research the effect of competition in determining price (provide actual examples) • chart the price levels of several products and several firms to determine if economic conditions affect product pricing • identify and explain how governments at all levels, through legislation, influence the market environment and pricing decisions • discuss how a retail operation deals with external factors.	
Pricing Objectives	• research factors that determine how sales policy and pricing guidelines are determined • describe the effect of each of the following factors in determining pricing objectives: – profitability (maximizing profits) – volume (maximizing sales/market share) – competition (price stability) – image (prestige).	
Pricing Policies	• define pricing policy • explain how the profit motive is influenced by the consumer's ability to pay • discuss conditions under which pricing guidelines are established (pricing objectives, organization's cost structure, marketing strategy): – below competitor's price – same level as competitor's price • describe the application and effect of pricing policies: – market penetration (low entry) – skimming (high entry) – comparable (competitive range) – flexible (one-price, variable) – relative (desired level) • identify under what conditions prices will be lowered and by what percentage/amount.	

MODULE M&M306: PRICING (continued)

Concept	Specific Learner Expectations	Notes
Price Determination	*The student will:* • define cost of merchandise, variable/flat expenses, overhead • research and explain how price is determined: – economic analysis – cost plus – marketing approach • illustrate through charts, graphs, formulae and explanation the market structure impact on price: – monopoly – monopolistic competition – pure competition • calculate average cost, average variable cost and marginal cost • describe "elasticity" as it applies to price determination • discuss cost-oriented pricing and indicate how calculations determine price • prepare a pricing decision flow chart as a basis for price determination • complete a break-even analysis chart and explain its purpose • draw a supply and demand graph and discuss the potential impact of each variable on price • differentiate between fixed and variable costs and provide examples • discuss the impact of inflation on price.	
Pricing Strategies	• describe how pricing policies influence pricing strategies and provide examples for the following: – promotional pricing – price lining – unit pricing – psychological pricing – other pricing strategies • define the following price quotation terms and explain why they are used, what impact they have on the potential buyer, and provide examples of each: – list price – market price – quantity discount	

Concept	Specific Learner Expectations	Notes
Pricing Strategies (continued)	*The student will:* – cash discount – trade discount – rebates – trade-ins – zone pricing – negotiated contracts – competitive bidding – FOB origin.	
Pricing Decisions	• discuss the impact of sales on pricing adjustment decisions • describe conditions and provide examples under which retail price will be: – increased – maintained – lowered • identify the major reasons for price markdowns and the need for adjustment price tracking.	
Price Calculations	• calculate: – planned markup percentage $\frac{(\text{profit} + \text{expenses} + \text{deductions})}{\text{sales} + \text{reductions}}$ – markup percentage of retail $\frac{(\text{markup in dollars})}{\text{retail price}}$ – markdown percentage $\frac{(\text{dollar markdown})}{\text{total sales}}$ - cash discounts (6/10, net 30) – trade discounts (list, less 30, less 10) (list 30/10)	

MODULE M&M307: DISTRIBUTE IT

Level: **Advanced**

Prerequisite: **None**

Having products and services at the right place when customers demand them is an essential component of the marketing mix. In this module the learner will explore the channels of distribution and modes of transportation used to direct goods from the producer to the ultimate consumer.

Module Learner Expectations and Assessment Standards

Module Learner Expectations	Assessment Standards
The student will: • describe the distribution process	*The student will:* • report (using text, graphs, pictures, examples, illustrations) how products are made available to customers by addressing: – channels of distribution – physical distribution – distribution strategies – marketing systems – receiving procedures – distribution selection factors • create a comparison chart showing the actual route, carriers, costs and time required to move products from the producer to the customer through one, two and three marketing intermediaries.

Specific Learner Expectations

Concept	Specific Learner Expectations	Notes
Channels of Distribution	*The student will:* • identify the types of wholesalers and their purpose • define channels of distribution and provide examples • discuss the role of producers, processors, manufacturers, wholesalers, retailers, consumers and identify examples of each	
• functions	• explain the purpose of the distribution process and identify the functions that this exchange process facilitates: – sort – accumulate – standardize lots	

Concept	Specific Learner Expectations	Notes
• types • transportation carriers • modes of transportation	*The student will:* • compare the types of channels with a varying number of intermediaries and provide examples of each: – produce to consumer (direct) – one intermediary (retailer) – two intermediaries (wholesaler, retailer) – three intermediaries (agent, wholesaler, retailer) • discuss the role of a broker, commission agent (sales, manufacturer) • research information relating to common carriers and indicate considerations vital to making decisions: – common – contract – private • compare the advantages and disadvantages of the various modes of transportation (cost, accessibility, reliability, in-transit time, flexibility): – rail – road – pipelines – air – water.	
Physical Distribution	• describe the physical distribution activities and what considerations are involved: – handling – shipping – storage • explain how the physical distribution processes accommodate the following: – customer service – transportation – inventory control – materials handling (utilization, containerization) – warehousing.	

MODULE M&M307: DISTRIBUTE IT (continued)

Concept	Specific Learner Expectations	Notes
Channel Selection	*The student will:* • describe the selection factors that producers must consider when making decisions about channel distribution: – producer – market – product – competition.	
Distribution Strategy	• discuss the relative merits (identifying strengths and weaknesses) of the major distribution alternatives and provide specific examples: – intensive – selective – exclusive.	
Marketing Systems	• identify existing organizations/businesses that utilize the following marketing systems and explain how they operate: – corporate – administered – contractual – retail group.	
FOB Shipping Terms	• explain what the following shipping terms mean and what impact they have on the buyer: – FOB factory – FOB destination – FOB shipping point.	
Receiving Procedures	• describe the sequence of events from order delivery to order verification • discuss what remedy the buyer has or what action that can be taken: – damage/breakage – substitution/poor quality – overage/shortage – lost/misplaced order.	
Storage	• discuss storage consideration from the buyer's perspective when orders are received: – sales floor – warehouse.	

MODULE M&M308: ADVERTISING

Level: **Advanced**

Prerequisite: **Promotion (M&M204)**

The advertising process involves the mass media to communicate with a mass audience in order to establish a continuous recognition of a sponsor or product. This module is an introduction to communication channels, delivery strategies and advertising media that can be used to inform potential customers about products and services available in the marketplace.

Module Learner Expectations and Assessment Standards

Module Learner Expectations	Assessment Standards
The student will: • design advertisement layouts for print, electronic, and supplementary media	*The student will:* • develop an "advertising handbook", which: – identifies how to determine the target market – explains media alternative pros and cons – describes and illustrates the focus and layout considerations for: • print • electronic • supplementary media • create advertisements for: – print – electronic – supplementary media.

Specific Learner Expectations

Concept	Specific Learner Expectations	Notes
The Advertising Process • target market	*The student will:* • explain what advertising is and what purpose it serves • comment on advertising as a marketing tool, art form, reflection of society • identify the type of advertisement and provide examples of each: – consumer product – consumer service – business product – business service – advocacy advertising • discuss issues in advertising (gender stereotyping, misleading advertising, laws and regulations)	• collect a range of advertisements and establish a display/ demonstration

Concept	Specific Learner Expectations	Notes
• geographic market • media alternatives	*The student will:* • obtain specific examples of geographical marketing strategies: – local – regional – national – international • provide examples of a range of media advertising: – print (newspapers, magazine) – broadcast (radio, television) – mail (brochures, letters, circulators, catalogues) – telemarketing – outdoor.	
Print	• analyze various print advertising media • differentiate the various media with respect to: – cost in relation to return on investment – advantages and disadvantages of the different types of print media – rates • evaluate a variety of advertisements and critically assess their effectiveness according to the following criteria: – neatness – creativity – layout – headline – copy – pertinent information of the business (logo, location, address, telephone, map, etc.) – overall impact.	• collect/display print advertising: – newspapers – magazines – flyers – direct mail – outdoor displays
Creating a Print Advertisement	*The student will:* • discuss the steps in planning a print advertisement: – state the objective – define the target audience – select the buying motive (use of USP) – determine the placement of the advertisement	

Concept	Specific Learner Expectations	Notes
Creating a Print Advertisement (continued)	*The student will:* • identify the components of the advertisement: – borders – headline(s) – illustration – copy – logo • discuss and demonstrate the use of effective layout arrangements using the AIDA concept: – use of white space – use of different fonts – placement of the various components.	
Presentation	• present orally the concepts used in designing a print advertisement: – explain the rationale of the advertisement, how the objective was achieved, and what section of the paper the advertisement would be placed in – explain how the AIDA concept was used in creating the advertisement • evaluate own print advertisement.	
Electronic Media	• use the AIDA concept when evaluating broadcast advertisements • describe the role of the CRTC, discuss the types of broadcast advertising	• explore the history of both radio and television • explain the types of ownership and programming found in radio • identify a variety of radio stations available to the various listeners in the immediate area • describe the types of television stations: – network-owned – network-affiliated – independent

Concept	Specific Learner Expectations	Notes
Electronic Media (continued)	*The student will:* • discuss television time slots available for advertising • investigate other means of television advertising such as cablevision, pay TV, videocassette recordings, satellite.	
Advertising on Radio	• analyze radio advertising including: – radio time slots – effectiveness of commercial • identify and calculate the cost of radio commercials in various time slots • discuss advantages versus disadvantages of radio broadcasting as an advertising medium • identify elements involved in preparation of a radio commercial • demonstrate the use of radio production techniques when planning and producing a radio commercial • evaluate own radio commercial.	• script types, live versus taped, length, repetition, voices
Advertising on Television	• analyze television commercials including: – time slot – effectiveness of the commercial • identify and calculate the costs of radio commercials in various time slots • discuss the advantages versus disadvantages of television broadcasting and an advertising medium • explore the special considerations surrounding broadcast advertising • demonstrate the use of television production techniques when planning and producing a television commercial: – types of commercials – storyboard preparation – use of equipment • evaluate own television commercial.	• piggyback, product protection, etc. • camcorder-types and lengths of shots, lighting, production sequence

MODULE M&M309: PROMOTIONAL MESSAGE

Level: **Advanced**

Prerequisite: **Promotion (M&M204) [Advertising (M&M308) Recommended]**

Advertising messages are seen and heard on a daily basis via a range of media as marketers attempt to positively influence a designated target audience. This module provides an opportunity to create specific advertising messages (print, broadcast and electronic), which are designed to encourage the purchase of products and services. Students will research, plan and develop the advertising messages appropriate for the various media.

Module Learner Expectations and Assessment Standards

Module Learner Expectations	Assessment Standards
The student will: • write promotional messages	*The student will:* • develop an "advertising manual", which describes essential advertising background information about the industry and the messages: – types of advertising – laws and regulations – approaches/strategies – presentation/central themes – planning considerations • explain the communication process and format for: – print • types of advertisements • copywriting/art • layout – radio • types of commercials • production processes – TV • designing commercials • production stages – outdoor/other media • create advertising messages appropriate for each media.

Specific Learner Expectations

Concept	Specific Learner Expectations	Notes
Types of Advertising	*The student will:* • describe and provide examples/illustrations of advertising considerations aimed at: – the consumer • national/local • retail • end-product • direct-response	

Specific Learner Expectations

Concept	Specific Learner Expectations	Notes
Types of Advertising (continued)	*The student will:* – business-to-business • corporate • trade • industrial • to professionals.	
Laws/Regulations	• research and discuss the need for advertising control, citing specific situations that cause concern • describe what role regulatory bodies play in the advertising industry • debate and provide examples of advertising issues.	• ASC (Advertising Standards Council) • CAF (Canadian Advertising Foundation) • CRTC (Canadian Radio and Television Telecommunications Commission) • comparative and misleading advertisements • gender stereotyping • sex, children, harmful substances
Consumers and Market Segmentation	• explain why it is important to be able to describe/predict consumer behaviour and the factors that need to be researched: – psychological – demographic – psychographic • describe how a large market is divided into smaller markets, why this is done, and the impact it has on advertising • explain and provide examples of the impact on the consumer when exposed to the following advertising messages: – corporate image – product improvement	

Concept	Specific Learner Expectations	Notes
Consumers and Market Segmentation (continued)	*The student will:* – promotion incentive – new audience – line extensions – variety of uses – increased frequency • discuss the intended purpose of the following advertising appeal techniques and identify examples of each: – humorous/emotional – factual/comparative – positive/negative – lifestyle/sexual • differentiate between various advertising tactics, provide examples, and indicate how the advertiser intends to maximize the impact of the message: – demonstration – endorsement – torture test – testimonial – product as hero.	
Communication Considerations	• describe how to complete the initial steps during the advertisement planning phase: – establish creative team and assign responsibilities – collect information – develop central theme – identify media – consider format.	• copy writer, art director, creative director • client, product/service, customer • attract attention, position the product, clarify benefit, establish uniqueness • print, electronic, other • layout, art, text, fonts, headings

Concept	Specific Learner Expectations	Notes
• printing • radio • television	*The student will:* • assess draft copy for: – readability – imagination – directness – balance • draft scripts (catchy, memorable) for: – announcement – testimonial – dialogue – musical • complete production process (mixed tape—words, music, special effects) • prepare story (rough board and comprehensive storyboard) • complete production on tape (audio/visual integration) • create message and design display for: – outdoor sign – transit – point of purchase – direct mail • compare existing advertisements for similar products or services with drafted copy, scripts, storyboard.	
Evaluation	• assess the advertisement creation process and identify effective and less than effective activities • rate the effectiveness of the completed advertisement, indicating strengths and weaknesses.	

MODULE M&M310: PROMOTIONAL CAMPAIGN

Level: **Advanced**

Prerequisite: **Promotion (M&M204)**

The promotional campaign consists of a coordinated series of advertisements and promotional activities that are designed to support a specific sales or publicity goal. This module presents an opportunity for the learner to develop a promotional campaign using print, broadcast and electronic media to publicize the products and services available to potential customers.

Module Learner Expectations and Assessment Standards

Module Learner Expectations	Assessment Standards

The student will:
• develop a promotional campaign
	The student will:
	• identify a specific organization and create, by using text, visuals, examples, a promotional campaign that addresses:
	– promotional planning
	  • objectives
	  • target audience
	  • communication strategies
	  • situational analysis
	  • logistical considerations
	• present the promotional campaign (written, orally, explained)
	• create the promotional messages:
	– layout
	– writing
	• evaluate the:
	– promotional campaign strategies
	– development process.

Specific Learner Expectations

Concept	Specific Learner Expectations	Notes
Promotion	*The student will:* • compare an advertising program with a promotional campaign • differentiate between sales promotion and non-sales promotion initiatives and provide several examples of each • provide an explanation and examples of consumer promotion and trade promotion • discuss when a promotional campaign would be used and on what basis that decision would be made.	

Concept	Specific Learner Expectations	Notes
Promotion Planning	*The student will:* • explain how to address each of the following planning steps in a promotional campaign and indicate what action is needed: – objectives defined – current status evaluated – external influences/financial considerations – alternative possibilities identified – decision/rationale – implementation – feedback/evaluation.	
Strategy Considerations • promotional	• identify the significance of considering the impact of a promotional campaign as it relates to: – the theme – activity/frequency – relationship between promotion/product – advertising media.	
Marketing Plan • marketing	• research an existing business venture and determine the marketing plan including: – sales promotion – advertising • identify a potential: – product/product history/product competition – customer market • develop a skeleton marketing plan for a specific business venture.	
Advertising Plan	• plan an advertising budget • explore the use of coop advertising to supplement your advertising dollar • select the advertising medium to use • compare advertising dollars with preferred media • adjust your advertising plan to work within your budget.	• look at past history—what worked, what didn't, general trends—ask advice of local media and for yearly plan books

Concept	Specific Learner Expectations	Notes
Promotional Campaign	*The student will:* • identify a business venture, location, products/services • conduct a position analysis • identify campaign objectives • establish a budget • choose the media strategies • create the promotion message/presentation • establish time lines • evaluate the process/project.	

MODULE M&M311: DISPLAYING

Level: **Advanced**

Prerequisite: **Promotion M&M204)**

Visual merchandising helps to sell products at the point of purchase. In this module the learner will become familiar with the different types of visual merchandising, how to construct attention-getting displays and what to look for when evaluating visual merchandising.

Module Learner Expectations and Assessment Standards

Module Learner Expectations	Assessment Standards

The student will:
• design a merchandising display
	The student will:
	• develop a "display manual" (using text, charts, visuals, diagrams, pictures), which addresses:
	– display
	  • purpose/types
	  • window/interior
	  • design
	  • installation
	  • evaluation
	• create a merchandising display for a specific organization.

Specific Learner Expectations

Concept	Specific Learner Expectations	Notes
Visual Merchandising • purpose	*The student will:* • describe what visual merchandising is and provide examples, illustrations, pictures of various displays • explain how the displays can influence the customer: – route traffic – catch attention – expand window theme – pleasant store environment – quick product identification – entice entry to store – reinforce store image – support sales presentations	

Concept	Specific Learner Expectations	Notes
• types	*The student will:* • distinguish the different types of visual merchandising and provide examples: – interior (window, floor) – exterior (storefront, outside walls, sidewalk).	• assess the effectiveness of several retail outlet displays
Window Display	• differntiate between and provide examples of: – closed window – partly closed window – open window • explain and provide examples of the focus of a window display and how it can support: – mass merchandising – sale products – line of goods – related goods – special events.	
Interior Display	• indicate how the interior display(s) can be coordinated with the window display and maximize exposure to high traffic areas • differentiate between display design (provide examples) and a rationale for each: – open – closed • describe the focus of each display (advantages/ disadvantages) and identify possible locations: – island – end – platform – shadow box – background – point-of-puchase.	
Display Design • elements	• discuss the role that each design element plays in visual merchandising: – line – shape – size – texture – colour – weight	

MODULE M&M311: DISPLAYING (continued)

Concept	Specific Learner Expectations	Notes
• principles	*The student will:* • explain how to incorporate the following principles in visual merchandising: – harmony – contrast – emphasis – balance – proportion.	
Creating a Display	• identify and discuss the principles and guidelines of visual merchandising (provide examples from retail outlets): – KISS – customer's viewpoint – use of lines and design—vertical, horizontal, curve, diagonal – use of colour—colour terms, schemes, background – use of space—size, proportion, three dimensions – patterns—interface, stair step, gradation, pyramid, zig zag, repetition, radiation – balance, formal and informal – use of lighting – use and construction of different kinds of props • discuss the steps in planning a display: – purpose, theme, location, merchandise selection, time frames, cost – coordinate display with store image – type of display/focus/design – assemble materials needed • plan and construct an exterior or interior display • maintain a display.	• clean windows; merchandise neat and clean; replenished, fully stocked shelves; props in good repair; clean background and floor; maintained lighting fixtures; changing the display frequently.

Concept	Specific Learner Expectations	Notes
Evaluation	*The student will:* • evaluate the display effectiveness: – location – design – theme – impact/appeal • recommend possible changes to the process of display creation and the display itself.	

MODULE M&M312: RETAILING

Level: **Advanced**

Prerequisite: **Customer Selling (M&M105)**

The retail business is the last link in the channel of distribution system that provides the customer with an opportunity to purchase goods and services. Included in a retail operation is the selling floor activities as well as the non-selling duties and responsibilities. This module provides the learner with both aspects of the typical retail outlet.

Module Learner Expectations and Assessment Standards

Module Learner Expectations	Assessment Standards
The student will: • demonstrate retail marketing skills	*The student will:* • develop a "school store handbook" (using text, visuals, pictures, examples), which explains retailing functions: – buying • planning • selecting • negotiating • receiving – selling • personal • non-personal – operations • merchandise • personnel • facilities – control • budgeting • recordkeeping • accounting • demonstrate sales floor and non-sales floor retailing skills.

Specific Learner Expectations

Concept	Specific Learner Expectations	Notes
Retailing	*The student will:* • explain the role of each: – producer – wholesaler – retailer – consumer	

Concept	Specific Learner Expectations	Notes
Retailing (continued)	*The student will:* • discuss the importance of retail management knowledge about: – consumer behaviour – product/service knowledge – business/economic climate – retail practices • describe and provide examples of the types of retail marketing outlets: – in-store – automatic – direct – mailorder – home-based – telemarketing.	
Retailing Functions • buying merchandise for resale • selling	• identify the various activities/duties being performed and discuss similarities and differences • determine customer needs/wants for products/services • research buying data/sources: – supplier information, sources, reputation – product classification, price, availability • order product • receive merchandise order • demonstrate personal selling skills by: – approaching the customer – presenting/demonstrating products – closing the sale • develop non-selling skills by creating product: – advertising – displays.	• observe several retail outlets • description, quality, brand, size, quantity • possession, checking, storage, stocking
Operations • personnel	• describe employee policies: – recruiting – training – promoting	

Concept	Specific Learner Expectations	Notes
• merchandise • facilities	*The student will:* • calculate/mark prices on merchandise • stock shelves, take inventory • provide customer services • operate cash register and reconcile cash balance • assume responsibilities of sales supervisor • follow and enforce policies and regulations • perform daily maintenance and upkeep activities • monitor floor activities and maintain security.	
Control	• maintain accurate and current records for: – recordkeeping – budgeting – accounting.	

MODULE M&M313: SALES PRESENTATION

Level: Advanced

Prerequisite: Sales Techniques (M&M205)

A formal sales presentation involves a salesperson communicating via various media the marketing message to a potential customer through a series of planned deliberate steps. In this module the learner will research, plan, develop and deliver a formal sales presentation.

Module Learner Expectations and Assessment Standards

Module Learner Expectations	Assessment Standards
The student will: • give a sales presentation	*The student will:* • develop a formal sales presentation plan • complete preparation of resources and appropriate sales activities • deliver the sales presentation including: – preapproval – determine wants – presentation – resistance – closing – assurance • assess the effectiveness of the presentation.

Specific Learner Expectations

Concept	Specific Learner Expectations	Notes
	The student will:	
Sales Presentation	• discuss why formal sales presentations are made, identify possible products/services and potential customers and environments	
• planning	• research potential target markets and customer buying motives and needs • develop a strategy plan: – what to say – what to do – how to present	
• preparing	• evaluate own: – personality traits – sales skills • improve areas of weakness	

Concept	Specific Learner Expectations	Notes
• preparing (continued) • presenting	*The student will:* • develop product/service knowledge, expertise, demonstration skills • create selling support aids/materials/displays • identify potential buyer benefits • check availability of product service • preapproach: – determine how to establish rapport • presentation: – identify customer's needs/wants, likes/dislikes, opinions, understanding, questions – involve customer with the demonstration, if appropriate, appeal to customer's senses – employ sales techniques, selling aids • resistance: – deal with concerns, objections, excuses • closing: – integrate closing techniques to make the decision easy and to finalize the sale – offer reassurance/support for the decision • follow up: – explain after-sale support (warranties, service).	
Evaluation	• assess the performance.	

MODULE M&M314: MANAGING SALES

Level: **Advanced**

Prerequisite: **Customer Selling (M&M105)**

The refinement of marketing skills is developed by having "hands-on" opportunities to integrate theoretical concepts into practical applications. This module is designed to enable the learner to expand knowledge, develop decision-making skills by participating in non-sales floor activities including the application of marketing management functions.

Module Learner Expectations and Assessment Standards

Module Learner Expectations	Assessment Standards
The student will: • demonstrate nonsales floor competence	*The student will:* • perform buying functions: – select merchandise – order – receive • perform operating functions: – merchandise – personnel – facilities • perform controlling functions: – budgeting – records (purchase, inventory, sales, expense, financial).

Specific Learner Expectations

Concept	Specific Learner Expectations	Notes
Buying	*The student will:*	
• purchasing procedures	• select merchandise required • determine price • use purchase order/requisition forms when buying goods	
• receiving goods	• discuss procedures and demonstrate methods for receiving goods (receiving, checking, storage, stocking).	

Concept	Specific Learner Expectations	Notes
	The student will:	
Merchandise Handling		
• pricing and marking	• calculate the markup of goods based on cost and retail price • calculate break-even points • identify how and when goods are marked down • calculate the markdown of goods • identify and discuss what type of price tags should be used • identify pertinent information to be included in price tags (including cost codes)	
• inventory	• identify the different methods of inventory control available • demonstrate the use of various inventory methods • explain and calculate stock turnover	
• promotion	• design/create: – advertising materials – merchandise displays.	
Personnel	• identify employment policies: – hiring – training – promoting – supervision.	
Facilities	• perform housekeeping activities: – cleaning – maintenance – redecorating.	
Control	• maintain accurate and current records for: – purchases – sales – expenses – inventory – financial	

Concept	Specific Learner Expectations	Notes
• payment of goods • budgets • financial statements	*The student will:* • verify the accuracy of invoices • identify the different types of discounts available to retailers (trade, cash, etc.) • calculate discounts and the net totals of invoices • record the purchases of goods received • pay invoices • assist with the preparation of budgets • assist with preparation of financial statements: – income statement – balance sheet.	

University of Alberta Library
0 1620 0030 8898